

UNITED STATES DEPARTMENT OF AGRICULTURE  
EXTENSION SERVICE  
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Clothing Markets in America\*

Textiles and Clothing Industry

Textiles and clothing are the fourth largest industry in America (16.21 billions) being topped by foods, machinery, iron, and steel. The industry has less mechanization than any other, so the number of wage earners has grown steadily.

The women's apparel industry is only about 100 years old, but number one in employment. It has been estimated that in 1791 two-thirds to four-fifths of all clothing was made by homemakers. The first ready-to-wear produced consisted of shoes and hats in 1837. In 1840 the first factories for cloaks, suits, and mantillas were established. In the Jewish immigration (1880-90) many reported themselves as dress-makers, seamstresses and the like. Industry had bad growing pains. Sweatshops and other bad conditions gave the industry a reputation which it has not completely overcome. Unions began in 1879 with the charter of the International Ladies' Garment Workers Union. In 1910 a strike of 9 weeks resulted in protocol peace-vacation, committee of disputes, sanitary control, payment in cash and other benefits. It was the beginning of collective bargaining. There has not been a major strike in this union in New York for 22 years.

In 1924 Congress cut off immigration. The European pool of skilled workers has dried up. Some firms predict they will be out of business in 10 years. The average age of workers in better shops is 60 years or more. The work requires skilled handicraft. How to solve: Labor take in apprentices; development of section system of production.

Quick look at earnings: In 1898 -baster, \$1.88 per day; cloak maker, \$2.70 per day (10 to 12 hour working day or more). Now - \$14.98 for 6 to 8 hour day and 5 day week. Highly skilled workers \$10,000 or more a year.

Quick look at production increases:

1927	- - -	104 million women's and misses' dresses
1939	- - -	109 million women's and misses' dresses
1927	- - -	7 million blouses
1939	- - -	34 million blouses (due to fashion)
1937	- - -	859,000 skirts
1939	- - -	13 million skirts (due to fashion)

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\*Notes taken by Alice Linn from the talk given by Earl Elhart, managing editor, Women's Wear Daily, at the Syracuse Seminar, on August 16, 1948.



## Regional Markets

New York	Boston	Dallas
Chicago	Los Angeles	San Francisco
Philadelphia	Twin Cities	Milwaukee
St. Louis	Kansas City	Others
Cleveland		

New York produces 70 percent of the country's entire output of women's and children's outerwear; 91 percent of entire country's raincoat production; greatest percentage of children's and infants' underwear and nightwear of woven production; 59 percent of children's and infants' dresses; 86 percent of children's and infants' coats; and 74 percent of blouses. The section system is found in greatest percentage outside New York, mostly in the Middle West. Biggest regional market outside of New York is Chicago.

Chicago makes almost every kind of women's apparel. Before the war its most common price in dresses was \$10.75 and \$12 - now \$14 and \$18. Chicago producers are mostly adapters, rather than originators of styles. New York originates. Copying and adapting are not illegal. Chicago has greatest production of housedresses, one industry which New York does not monopolize. Wash dress expositions are held there several times a year. The Chicago coat and suit industry grew during the First World War, then decreased, grew again during the Second World War; now holds its own. Part of the wash dress market is on an open shop basis. Although Chicago is a big wholesaler of wash dresses, wholesaling of women's dresses is much less common than it was 20 year ago.

Los Angeles has grown while Chicago has decreased. It is outstanding for sportswear, spectator and active. It claims to have originated pedal pushers, midriff, and other styles. Adrian's custom wholesale and 10 or 12 other important houses have added materially to the reputation of the Los Angeles market. The only time it shows ahead of New York is in resort apparel. The market in Los Angeles is not highly unionized. California Apparel Creators is the leading group.

San Francisco started work clothes during the gold rush. It has a 70 million dollar yearly volume now. Prices are moderate, dresses \$10.75 to \$16. It is mostly union with few open shops, in contrast to Los Angeles. San Francisco has more inside shops because real estate costs less. An apparel center is now being built.

Philadelphia is important for production but not for selling. Here manufacture of clothing for persons 5 feet 4 inches and under began with Edolson and Sons. The largest house for children's clothes in the U.S. is Roseneau Bros.

St. Louis is the city of junior fashions.

Boston in 1897 started in underwear and blouses and now makes skirts and sportswear.



Kansas City is most famous for wash dresses. It began as a wholesale market. It has sectional work production; almost no contract work. I.L.G.W.U. went in 1936.

Dallas is growing having started in 1934. It makes popular-priced sportswear with youthful modeling. It is beginning to recognize designers as St. Louis did. The industry works with the school of design at Southern Methodist University.

Cleveland is one of the oldest and best coat manufacturing centers and prides itself on road selling. Printz-Biederman Company is still an important factor in women's coats.

Rochester is the leading center for the manufacture of men's clothing.

Minor markets include Milwaukee, the Twin Cities, Portland, Seattle, and Atlanta.

Women's Wear Daily now prints sections for 12 out-of-town markets and also British and French section. It publishes news as it develops and highlights seasonal openings.

Timing - Fashion runs on a schedule:

January, February, and March -- Show cottons, wools.

February, March, and April -- Show rayons.

Middle May -- Fall showings.

July -- Holiday showings.

Middle May -- Suits and coats.

June (second week) -- Corsets and bras.

May 1 to 15 -- Teen wear.

July (2d and 3d weeks) -- Millinery.

April -- Footwear.

September -- Resort wear.

This is the pattern of the industry. It has changed since before the war; then it was complicated with a second showing (tied with Paris openings).

### Vertical Set-Ups

Vertical set-ups are now growing in the textile industry. Transshipping will be diminished. Textron is the most famous of the verticals. Burlington Mills are now tending toward their own finishing. The question is what will happen to vertical patterns in the falling market. (Converter pattern was typical in prewar days; converters bleach, dye and give special finishes).



## Questions and Answers

Q. How about clothes for older women?

A. The unsolved problem of economics. Very few stores have learned to merchandise and sell mature or larger sizes which are primarily a manufacturing problem. (From a given yardage 100 dresses can be made in junior size, but only 75 of larger sizes).

Q. The small, older woman has the worst problem; styles are too youthful.

A. Half-size was supposed to solve her problem.

Q. Why can't we find anything between very low undesirable goods and the very high priced?

A. Showings this May and June placed more emphasis on medium-priced lines. The manufacturers' theory was that shoppers would be shopping more carefully. Men's wear will go up. American Woolen has just announced price increases. Cotton and labor have doubled in cost since before the war.

## Follow-Up Session

In the meeting following Mr. Elhart's talk, Syracuse merchants presented examples of garments from various markets. Here are a few: From Dallas, young sports clothes, including a corduroy outfit. From Cleveland, coats in popular prices and featured a half-size cut to hide fat. From Boston, skirts and blouses. From California, a Mary McCoy \$25 dress (important designer in junior field). From Chicago, a Rothmoor coat (explained that average tailor's pay is \$280 for hand tailoring that goes into a Rothmoor coat; pointed out patented front edge and explained that a panel of buyers select styles each season.) From Harrodsburg, Ky., a mass-produced coat by Freddy Weisman, called a Sportleigh for \$39.95. This was shown as an example of a manufacturer who moved to the country to produce more cheaply and have better conditions for workers. From St. Louis, a Doris Dodson Junior Model. From New York, Herbert Sondheim high-style young clothes; Mangone Carnegie, Rosenstein, and others.